



REVIEW AND ASSESSMENT OF ONTARIO SCHOOL BOARD
POLICIES AND PROCEDURES ON OUTDOOR EDUCATION/
EXCURSIONS INVOLVING WATER-RELATED ACTIVITIES

PRESENTATION- APRIL 2018



Agenda

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Background and Purpose

Context and Project Overview

In July 2017, Toronto District School Board (TDSB) grade 9 student drowned during a board-sponsored canoe trip in Algonquin Park.

On August 17, 2017, the Ministry of Education (the Ministry) announced a review and assessment of Ontario's publicly funded school boards¹ policies and procedures on outdoor education/excursions², and their associated implementation and monitoring practices.

Through a competitive Request for Services process, the Ministry engaged Deloitte to conduct a review and assessment of Ontario school board policies and procedures on outdoor education/excursions (field trips) that specifically involve students participating in water-related activities.

The final report intends to inform the Ministry and school boards on practices to prevent student injuries by assessing the following:

- Whether board policies and procedures that meet the minimum standards for risk-management practices (i.e., Ophea's Ontario Physical Education Safety Guidelines - OSG), including swim test requirements, supervision ratios and instructor certification, are in place in each school board; and
- Whether the policies and procedures are consistently and systematically implemented and monitored for compliance.

Guiding Questions for the Review and Assessment:



What is the **current state** of school boards' policies and procedures on outdoor education/excursions involving students participating in water-related activities?



To what degree do these policies and procedures meet the **minimum standards for risk-management practices** set out in Ophea's Ontario Physical Education Safety Guidelines (OSG), including swim tests requirements, supervision ratios and instructor certification?



What are the **monitoring practices** in place to ensure that these policies and procedures are consistently applied board-wide?



What are the **compliance measures** in place (e.g., integrated into the approvals process, to ensure compliance with these policies and procedures)?

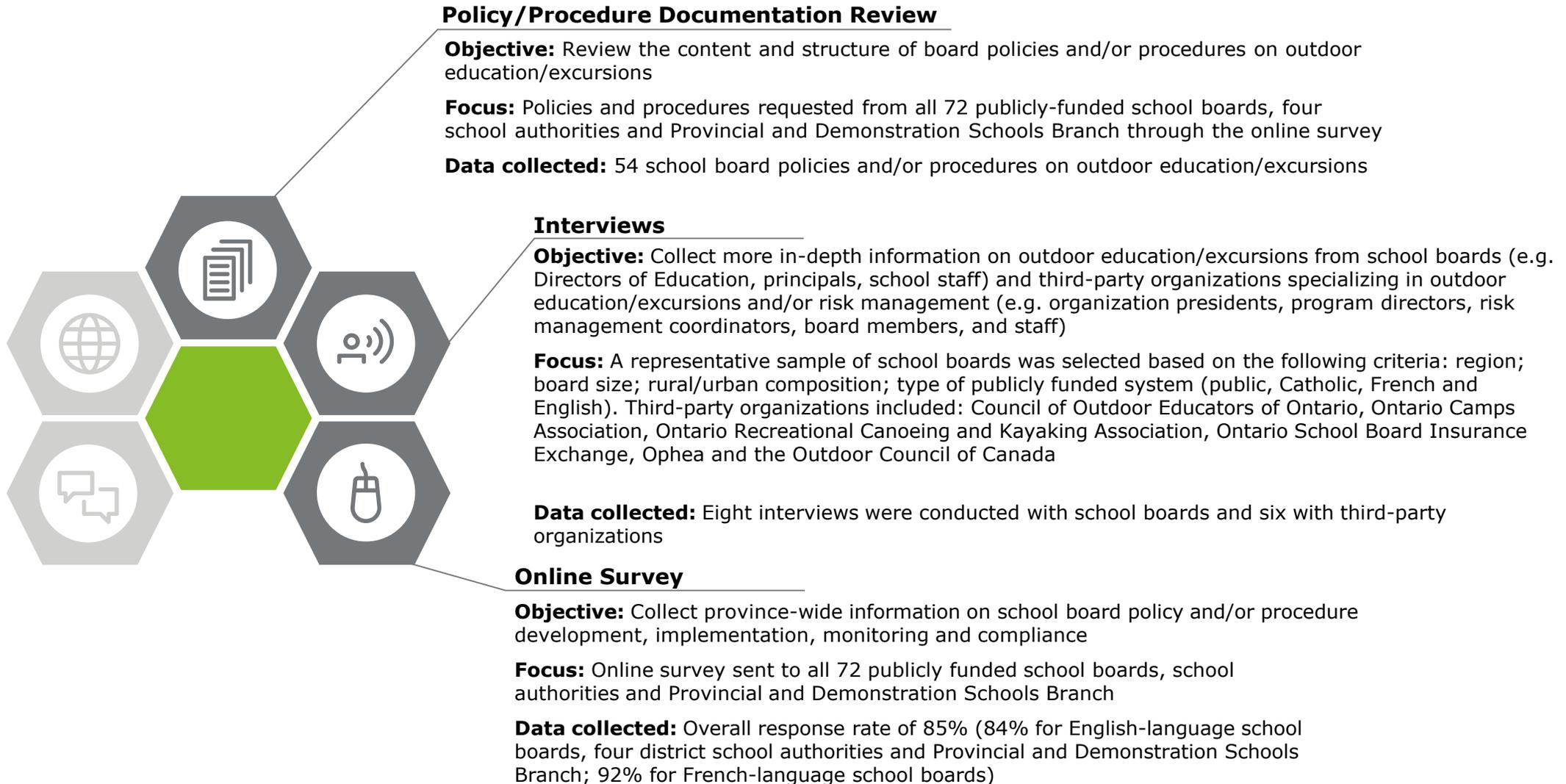


What are the **best practices** for school board policies and procedures for water-related outdoor education/excursions?

¹ **School boards** include all district school boards, school authorities and Provincial and Demonstration Schools Branch.

² **Outdoor education/excursions** are board-sanctioned activities that occur off school grounds whether as part of a formal outdoor education program or a school field trip (including overnight and day trips).

Methodology for the Review and Assessment



Methodology for the Review and Assessment

Jurisdictional Scan

Objective: Identify relevant applicable practices related to the development, implementation and monitoring of compliance with outdoor education/excursions policies and/or procedures that could be considered for implementation in Ontario

Focus: The identified jurisdictions were selected based on their similarities with Ontario (e.g., geography, population, school board structure, etc.) and the selection of practices identified in the other jurisdictions was based on their potential relevance in addressing the identified challenges in Ontario

Data collected: Scan included practices from four Canadian jurisdictions (British Columbia, Alberta, Quebec, and Prince Edward Island) and two international jurisdictions (New South Wales, Australia, and Devon County, the United Kingdom)

Focus Groups

Objective: Collect additional information from school boards (e.g. Directors of Education, principals, school staff) on successes and challenges related to outdoor education/excursion policies and/or procedures

Focus: A representative sample of school boards was selected based on the following criteria: region; board size; rural/urban composition; type of publicly funded system (public, Catholic, French and English)

Data collected: Two English language and two French language focus groups were conducted



Limitations

- The data collected from the survey, interviews and focus groups is self-reported.
- Not all boards participated in the surveys, focus groups and interviews. Review findings may not represent boards that did not participate in the data collection.

Key Finding 1:

The majority of school boards have policies and/or procedures on outdoor education/excursions



OVERVIEW

- Overall, 97% of school boards that responded to the online survey (n*=68) indicated that they have policies and/or procedures in place for outdoor education/excursions and 61% of boards that responded to the survey (n=67) review their policies and/or procedures every one to four years. However, policies and/or procedures vary significantly between boards (e.g., in terms of the level of detail, degree of specificity, structure, etc.).
- Focus group and interview participants indicated that this variability is related to limited provincial direction provided to boards to guide their policy development; differences in the internal capacity of boards to support policy development, and; regional contextual factors (e.g., approaches in response to the needs of the local student/community population, etc.).



STRENGTHS ACROSS SCHOOL BOARDS

1. Policies and/or procedures on outdoor education/excursions are in place, though there remains some variability
2. Board policies and/or procedures for outdoor education/excursions are reviewed and updated fairly frequently



CHALLENGES ACROSS SCHOOL BOARDS

1. Limited direction provided to boards to guide their policy development
2. Varying levels of expertise and administrative capacity across the province
3. School boards expressed an interest in sharing successes and challenges with one another related to the development and review of board policies and/or procedures
4. Additional work needed to incorporate equity-related considerations into board policies and/or procedures



KEY SURVEY DATA

Policies and Procedures

- **97%** of boards that responded to the online survey (n=68) indicated they have board-approved policies and/or procedures, and/or administrative procedures³ in place for outdoor education/excursions
- **93%** of boards (n=67) 'agree' or 'strongly agree' that their board has policies and/or procedures that define the safety guidelines for outdoor education/excursions
- **61%** of boards (n=67) review their policies and/or procedures on outdoor education/excursions every one to four years

Equity-Related Considerations

- **50%** of boards (n=68) have policies and/or procedures include considerations related to the diversity of the board's student population**

* For the survey data, 'n' is the total number of boards that responded to the specific survey question (the denominator for the percentage).

**Diversity considerations refer to, for example, acknowledging the need to attend to the different circumstances and needs of different parts of the student population (e.g., newcomers, including refugees; racialized groups; Indigenous students; students of lower socio-economic status).

³ 43% of boards indicated they have board approved policies and/or procedures and supporting administrative procedures for outdoor education/excursions; 29% indicated they have board approved policies and/or procedures for outdoor education/excursions; 7% indicated that they have administrative procedures; while 18% indicated they have 'other' outdoor education/excursion policies and/or procedures.

Key Finding 2:

School board policies and/or procedures on outdoor education/excursions are generally aligned with Ophea's Ontario Physical Education Safety Guidelines (OSG)



OVERVIEW

- In total, 94% of school boards that responded to the survey (n=68) use the OSG as the minimum standard for risk management of outdoor education/excursions. School boards also expressed broad satisfaction with the OSG. Further, 81% of boards that responded to the survey (n=67) have policies and/or procedures on outdoor education/excursion that meet or exceed the minimum standards outlined in the OSG.
- However, the ways in which boards embed the minimum standards of the OSG into their board policies and/or procedures varies (e.g., pointing to the OSG as a reference vs. directly incorporating sections of the OSG). Interview and focus group participants suggested this variability stems from a lack of direction on a standardized approach to incorporating the OSG into board policies and/or procedures to support implementation.



STRENGTHS ACROSS SCHOOL BOARDS

1. There is broad awareness of and satisfaction with the OSG across schools and school boards
2. The majority of school boards' policies and/or procedures meet or exceed the minimum standards in the OSG



CHALLENGES ACROSS SCHOOL BOARDS

1. Policies and/or procedures on outdoor education excursions incorporate the OSG differently (i.e., pointing to the OSG as a reference vs. incorporating sections of it directly) leading to potential inconsistencies in interpretation and implementation
2. Limited policies and/or procedures are in place to ensure third-party vendors (e.g., third party sites hosting outdoor education/excursions) meet the minimum standards of the OSG



KEY SURVEY DATA

Alignment with the OSG

- **94%** of boards that responded to the survey (n=68) 'agree' or 'strongly agree' that they use the OSG as the minimum standard for risk management for physical activity, including outdoor education/excursions involving water-related activities
- **81%** of boards that responded to the survey (n=67) have outdoor education/excursion policies and/or procedures that meet or exceed the minimum standards outlined in the OSG
- **72%** of boards that responded to the survey (n=67) outdoor education/excursion policies and/or procedures reference the OSG

Awareness of the OSG

- **90%** of boards that responded to the survey (n=68) 'agree' or 'strongly agree' that teachers/educators that are leading outdoor education/excursions involving water-related activities in their board are fully aware of the OSG

Key Finding 3:

Schools and school boards expressed an interest in additional support to interpret and implement board policies and/or procedures



OVERVIEW

- While boards are consistently providing schools with mandatory forms/templates to support the implementation of their outdoor education/excursion policies and/or procedures, 49% of school boards that responded to the survey (n=68) indicated that they provide mandatory and/or optional training and professional development related to safety in outdoor education for relevant school staff.
- Some focus group and interview participants suggested that ensuring consistent interpretation and implementation of board policies and/or procedures remains a challenge at the school and board level.
- Focus group and interview participants also expressed an interest in sharing information with one another about successes and challenges related to the implementation of board policies and/or procedures (e.g. developing a network of outdoor education leads).



STRENGTHS ACROSS SCHOOL BOARDS

1. Existing forms, templates and risk management tools available to support the planning and implementation of outdoor education/excursions



CHALLENGES ACROSS SCHOOL BOARDS

1. Limited training to support policy and/or procedure implementation
2. Boards and schools are expected to consult multiple sources when planning and implementing outdoor education/excursions
3. Schools expressed an interest in sharing successes and challenges with one another related to the implementation of board policies and/or procedures



KEY SURVEY DATA

Supporting Resources

- **96%** of boards (n=68) provide mandatory forms/templates to be used by staff to support implementation of board policies and/or procedures
- **68%** of boards (n=68) offer guidelines (e.g., "how-to" documents, etc.) and **50%** offer best practices (e.g., risk identification tools, checklists, etc.) to schools to support the implementation of their outdoor education/excursion policies and/or procedures

Training and Development

- **49%** of school boards (n=68) provide mandatory and/or optional training and professional development related to safety in outdoor education for relevant school staff
- **27.5%** of school boards (n=68) provide in-person training and **12%** provide remote training opportunities (e.g., e-learning, webinars etc.) to schools to support the implementation of their outdoor education/excursion policies

Sharing Practices across School Boards

- **32%** of boards (n=68) indicated they collaborate with other school boards to discuss outdoor education/excursion policies and/or procedures
- **59%** of boards (n=67) indicated that collaboration networks are not available to discuss practices and current issues with other school boards

Communication with schools

- **51%** of boards (n=68) conduct regular communication with principals and/or outdoor education staff to support schools
- **28%** of boards (n=68) provide support in identifying and/or liaising with third-party organizations

Key Finding 4:

Schools and school boards are interested in additional support to monitor adherence to requirements of board policies and ensure compliance is achieved



OVERVIEW

- The majority of boards that responded to the survey indicated that they have processes in place to review/monitor schools' implementation practices in relation to board policies and/or procedures as well as clear approval frameworks.
- Based on survey results, monitoring adherence to the specific requirements of board policies and/or procedures (e.g. tracking swim test results, instructor certifications, etc.) often occurs at the school level with the principal and/or teacher or outdoor educator. However only 37% of boards that responded to the survey (n=68) conduct audits of the implementation of outdoor education/excursion policies and/or procedures.
- Board-level interview and focus group participants described a variety of informal methods used to ensure compliance across schools in their board. Similarly, school-level interviewees and focus group participants described a variety of informal tools and templates to monitor adherence to board policies and/or procedures (e.g., excel tracking documents, hard copy forms, etc.).
- Interview and focus group participants expressed an interest in standardized tools and templates to enhance current practices for oversight of both school-level monitoring of requirements and board-level assessment of compliance with policies and/or procedures.



STRENGTHS ACROSS SCHOOL BOARDS

1. Schools and school boards have effective delegation of authority procedures in place for the approval of outdoor education/excursions



CHALLENGES ACROSS SCHOOL BOARDS

1. Schools expressed an interest in additional standardized tools and templates to monitor adherence to board policies and/or procedures
2. School boards expressed an interest in standardized tools to enhance existing mechanisms to ensure compliance with board policies and/or procedures



KEY SURVEY DATA

Delegation of Authority and Approval Procedures

- **93%** of boards (n=68) 'agreed' or 'strongly agreed' that their board has a clear delegation of authority framework to provide approvals for outdoor education/excursions

School-level Monitoring

- **41%** of boards (n=67) indicated that tools to assist the board in tracking results of mandatory requirements are currently available

School Board Compliance Oversight

- **75%** of school boards (n=68) 'agree' and 'strongly agree' that their board has processes in place to review/monitor schools' implementation practices in relation to board policies
- **37%** of school boards (n=68) 'agree' or 'strongly agree' that their board conducts audits of the implementation of outdoor education/excursion policies and/or procedures in schools
- **97%** of school boards (n=68) 'agree' or 'strongly agree' that their board ensures adherence to the supervision ratios in the OSG or in their board's safety standards
- **73%** of boards (n=68) 'agree' or 'strongly agree' that their board reviews and monitors schools' adherence to the OSG (or their board's safety guidelines)

Recommendation 1

Develop a set of guiding parameters for the monitoring and assessment of school compliance with board policies and procedures

OVERVIEW

It is important for school boards to ensure they have an approach that supports the standardized monitoring (i.e., tracking of key requirements by schools) and assessment (i.e. regular review and audit by school boards) of compliance with board policies and/or procedures. The monitoring and assessment approach should include:

1. School-based monitoring of requirements in board policies:

Monitoring report:

- A standardized provincial template (e.g. key definitions and checklists) could be developed and made available to all boards. These templates may identify key quantitative (e.g., supervision ratios, swim test results) and qualitative (e.g., inclusion of equity considerations) standards that schools should monitor and document for each outdoor education/excursion.

Post-excursion reflection exercise:

- The post-excursion reflection exercise is an opportunity for those involved with an outdoor education/excursion at the school level to collect feedback on successes, challenges and lessons learned. This could include a discussion between principals, outdoor education/excursion leads, volunteers, parents/guardians, students and/or third-party organizations.

2. Board-level assessment of compliance:

Boards could compile and review monitoring reports to assess schools' overall compliance with board policies and/or procedures. The board assessment process should include:

- A process for schools to submit their monitoring reports to the school board at a pre-determined frequency (i.e., monthly or quarterly reports); and,
- A process for action when the requirements of board policies and/or procedures are not met. For example, the board could work with the school to develop an action plan to:
 - a. Understand why minimum standards were not achieved; and,
 - b. Ensure the current approval framework addresses and prevents the issue from recurring prior to the next outdoor education/excursion.

EXAMPLES OF PRACTICES FROM OTHER JURISDICTIONS

- In Devon County, UK, the Outdoor Education Advisers Panel (OEAP) develops a 'National Guidance on Outdoor Education'⁴ including standardized guidelines and accompanying tools and templates related to monitoring and compliance (e.g., self-evaluation frameworks, role identification, etc.).
- In New South Wales, the School Sports Unit (SSU) provides schools with guiding questions to assess compliance with NSW's policies and guidelines.⁵ Each question is accompanied with instructions and suggested documents.

CONSIDERATIONS FOR IMPLEMENTATION

- Guiding parameters for the monitoring and assessment of school compliance with board policies and/or procedures and associated tools and templates (i.e., monitoring reports) could be provided to school boards. However, boards should retain the flexibility to adapt the approach and/or resources to meet their unique needs.

⁴ The **National Guidance on Outdoor Education** aims to reduce the burden on schools through the provision of standardized requirements that may be incorporated into school policies and procedures.

⁵ The SSU provides instructions and suggested documents to accompany each question, while providing schools with the flexibility to respond in their own way. A designated school contact (normally the principal) works with the SSU (through a regional officer) to answer these questions appropriately and ensure all requirements are met.

Recommendation 2

Identify training needs and build capacity

OVERVIEW

Rationale for recommendation:

Providing additional training and capacity building opportunities (e.g. e-learning opportunities, conferences, etc.) at the board and school level could address the following findings:

1. Varying degrees of outdoor education/excursions expertise and administrative capacity across boards in the province; and,
2. Limited outdoor education/excursion training and development available to all staff (i.e., board-level administrators and teachers) on:
 - a. Interpretation and implementation; and,
 - b. Monitoring and compliance.

The training could be delivered through virtual training or in-person training.

The training and capacity building should be designed to:

- Support the inclusion of equity-related considerations (e.g. through training on applying an equity lens to policy and/or procedure development).
- Ensure a broad awareness and shared understanding of centrally developed tools and templates (e.g., monitoring report) amongst schools and boards;
- Support board-specific policy and/or procedure development (e.g., how to incorporate OSG requirements into board policies, etc.);
- Facilitate consistent interpretation and application across schools and boards of OSG requirements (e.g., support understanding key sections of the OSG);
- Establish role-based (including volunteers) competencies and training related to planning, implementation and/or monitoring of compliance. These could address:
 - Requirements for planning and approval related considerations;
 - Risk management and liability related practices and considerations;
 - Effective implementation-related considerations; and,
 - Monitoring compliance.

EXAMPLES OF PRACTICES FROM OTHER JURISDICTIONS

In Alberta, the Canadian Rockies Public School Board, in conjunction with the Outdoor Council of Canada (OCC) developed⁶:

- Teacher-specific training on the core principles of outdoor leadership, including implementation and post reflection procedures; and,
- Administrator-specific training to develop effective oversight for outdoor programming.

CONSIDERATIONS FOR IMPLEMENTATION

The training content could be developed and delivered by:

1. The Ministry (i.e., leveraging internal expertise and capabilities);
2. Third party providers (i.e., using competitive procurement for the development and/or hosting of a training program); or,
3. Hybrid model incorporating the first two approaches (i.e., leveraging Ministry capabilities while outsourcing the development and/or hosting of training modules).

⁶ In Alberta, the Canadian Rockies Public School Board worked with the OCC to evaluate their outdoor education/excursion programming of which a key outcome was the development and provision of training and capacity building opportunities for staff and administrators. The training opportunities are tailored to the needs of each role throughout the process (i.e., planning and approving to implementation and monitoring).

Recommendation 3

Establish a centralized policy implementation support centre



OVERVIEW

A centralized policy implementation support centre would assist both schools and school boards to address the following:

1. Board and school representatives expressed an interest in additional Ministry direction and standardized tools in one location to support:
 - Policy and/or procedure development and interpretation; and,
 - Monitoring requirements and assessing compliance; and,
2. Variable outdoor education/excursion expertise and administrative capacity, across boards; and,
3. School board and school representatives expressed an interest in the development of a community of practice with board and school staff as well as third-party organizations in order to share best practices in outdoor education/excursions.

Establish a support system with:

- Centrally available tools, templates and guidance to both complement or enhance existing school board policies and/or procedures;
- Supporting resources to accompany standardized tools and templates (e.g., instruction resources, case examples, detailed definitions, etc.); and,
- Policy advice, interpretation and guidance (this could include in-person training and/or telephone and online support to answer questions).

Build awareness and information sharing across the province, by:

- Developing awareness tools and templates (e.g., awareness presentation templates for school boards to use at schools in their district, etc.);
- Establishing a Community of Practice (e.g., in person or online) available to school boards and their schools to interact with each other and share practices; and,
- Sharing important updates and new resources (e.g., updates to the OSG, new resources available, important information, etc.) across the province.



EXAMPLES OF PRACTICES FROM OTHER JURISDICTIONS

- In New South Wales (NSW), Australia the SSU hosts and maintains centralized policies, supporting tools and templates, and provides advice and guidance to schools through 10 officers situated regionally across the state.⁷
- In Devon County, in the UK, the OEAP hosts centralized tools and templates and uses an online forum of regional advisers to share information and drive consistency across all schools.⁸



CONSIDERATIONS FOR IMPLEMENTATION

- Three approaches to implementation should be reviewed for consideration:
1. Internal hosting by the Ministry (leveraging internal resources);
 2. Third-party organizations (i.e., competitive procurement for the development of the supporting resources and/or hosting/maintaining the services); or,
 3. Hybrid model incorporating aspects of the first two approaches.

⁷ Major functions of the SSU include hosting and maintaining centralized policies (and associated supporting tools and templates) and providing advice and guidance to schools. In consultation with the SSU, it was suggested that these support services increase engagement amongst schools, build consistency in the implementation of policies and procedures, and ultimately lead to greater compliance to centralized policies and guidelines.

⁸ The OEAP is made up of expert practitioners and representatives from local authorities. One of the primary roles of the OEAP is to provide support, advice and share practices to local authorities and practitioners via its online forum.

Appendices

Appendix A: School Board Stakeholders

Data Collection Method	Number of Participants	School Board Participation	
One-on-One interview	8	<ul style="list-style-type: none"> Toronto District School Board (Toronto DSB) Greater Essex County DSB Ottawa-Carleton DSB Trillium Lakelands DSB 	<ul style="list-style-type: none"> Superior North Catholic DSB Simcoe-Muskoka Catholic DSB Conseil scolaire de district catholique des Grandes Rivières Conseil Scolaire Viamonde
Focus Group	15-20 for each English Focus Group 5-7 for each French Focus Group	<p>Board officials/leaders in outdoor education/excursions (English):</p> <ul style="list-style-type: none"> Toronto Catholic DSB York Region DSB DSB Ontario North East Hamilton Wentworth Catholic DSB Niagara DSB Algonquin and Lakeshore Catholic DSB Rainy River DSB <p>School Principals/Instructors (English):</p> <ul style="list-style-type: none"> Peel DSB Waterloo Catholic Region DSB Lakehead DSB Upper Canada DSB James Bay Lowlands Secondary School <p>Board Officials/ leaders in outdoor education/excursions (French):</p> <ul style="list-style-type: none"> District catholique Centre-Sud Conseil scolaire du Grand Nord de l'Ontario Conseil scolaire de district catholique de l'Est Ontarien <p>School Principals/Instructors (French):</p> <ul style="list-style-type: none"> Conseil scolaire de district catholiques du Centre-Est de l'Ontario Conseil scolaire de district catholique du Nouvel-Ontario Conseil des écoles publiques de l'Est de l'Ontario 	
Online Survey	Survey sent to all boards	There was an overall participation rate of 85%, with a 92% rate of participation for French boards, and 84% rate of participation for English boards (including four school authorities and the Provincial and Demonstration Schools Branch).	

Appendix B: Third-party Organization Stakeholders

Stakeholder	Description
Ontario Physical and Health Education Association (Ophea)	Ophea develops and maintains the Ontario Physical Education Safety Guidelines, representing the minimum standards for risk management practices in relation to physical activities for school boards in Ontario.
Ontario School Board Insurance Exchange (OSBIE)	OSBIE's primary goal is to insure boards against losses and promote safe school practices. This is achieved through the development of in-depth field trip guidelines, risk management toolkits, consultations, and in-person presentations. Currently, approximately 96% of school boards are members with OSBIE.
Council of Outdoor Educators of Ontario (COEO)	COEO's goals are to establish and maintain professional practices in the field of outdoor education/excursions, to promote qualified leadership and professional growth for outdoor educators, and to promote the values of outdoor education/excursions and active environmental ethics as a core value of education. Many outdoor education/excursion leads at schools across Ontario are members of COEO, providing COEO a strong relationship with numerous school boards.
Ontario Camps Association (OCA)	OCA develops accreditation standards/provides accreditation for camps in Ontario. Many school boards use the OCA accreditation as a requirement for their camp selection process and have regular interactions with the OCA to ask questions and gain clarification on accreditation requirements.
Outdoor Council of Canada (OCC)	OCC leads numerous training programs for outdoor education/excursions leadership, and has in-depth experience working with school boards to conduct program reviews across Canada.
Ontario Recreational Canoeing and Kayaking Association (ORCKA)	ORCKA is the Ontario accreditation provider for canoeing and kayaking certifications, required by the OSG. They also have extensive experience providing training for beginners and experts, as well as individuals and organizations, regarding water-related activities. Many school administrators and staff are ORCKA certified, and in some cases are ORCKA instructors as well, this provides ORCKA with a deep relationship with many schools and school boards across Ontario.